

The session will begin at :03 after the hour.

This session is being recorded.

“In The Know” Session: General System Navigation & Demo

The first of a four-part series to help you prepare for the CSD CARES implementation.



INTRODUCTIONS



Erin Ramirez

Change Management Consultant



Jessica Renslow

Functional Training Lead



Darrin Weatherspoon

Project Manager

IN THE KNOW SESSIONS

In The Know (ITK) Sessions are an opportunity for you to be “in the know” about CSD CARES. Be sure to register for EACH session you would like to attend.

- TODAY, July 11 at 12:30 PM: General System Demo
- Tuesday, July 19 at 12:30 PM: Case Management (Attendance & Education)
- Thursday, July 21 at 10:00 AM: ERSEA
- Wednesday, July 27 at 10:00 AM: Case Management Overview

They are:

Opportunities to learn about the project, share resources & show demos of the system.

They are not:

Intended to be trainings or substitutions for trainings.

TODAY'S IN THE KNOW SESSION AGENDA

1. Overview of the project
2. Preparing for training
3. CSD CARES general system demo
4. CSD CARES resources for Agencies
5. Getting help & support
6. Opportunity for Q&A

WHAT IS THE CHANGE?

Moving from

C  **OPA**

to



CSD CARES

C hildren

A nalytics,

R eporting &

E valuation

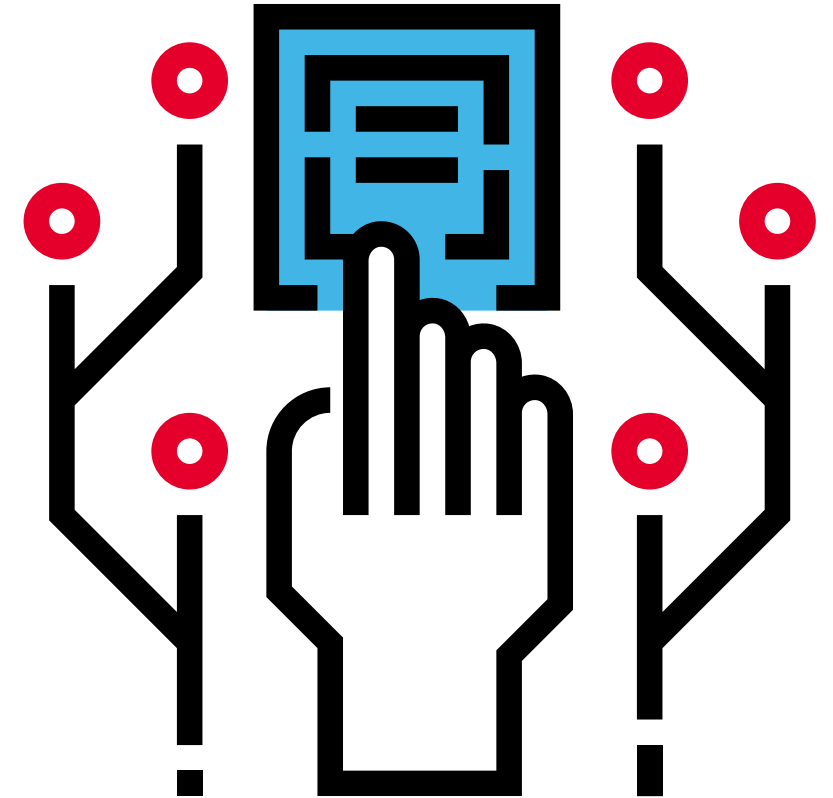
S ystem

WHY ARE WE MAKING THIS CHANGE?

Based on federal requirements, CSD must regularly procure bids to make sure it benefits from new, innovative technologies.

Salesforce was determined to best meet the needs of DFSS, agencies and sites.

The goal is to better serve the needs of Chicago's children and families and meet the requirements of funders.



CSD CARES RELEASES

Release 1

Training: April – July

Features for System Admins related to:

- Creating classes
- Assigning students
- Enrolling students

Release 2

Training: August

Features related to:

- Attendance
- Case Management
- ERSEA

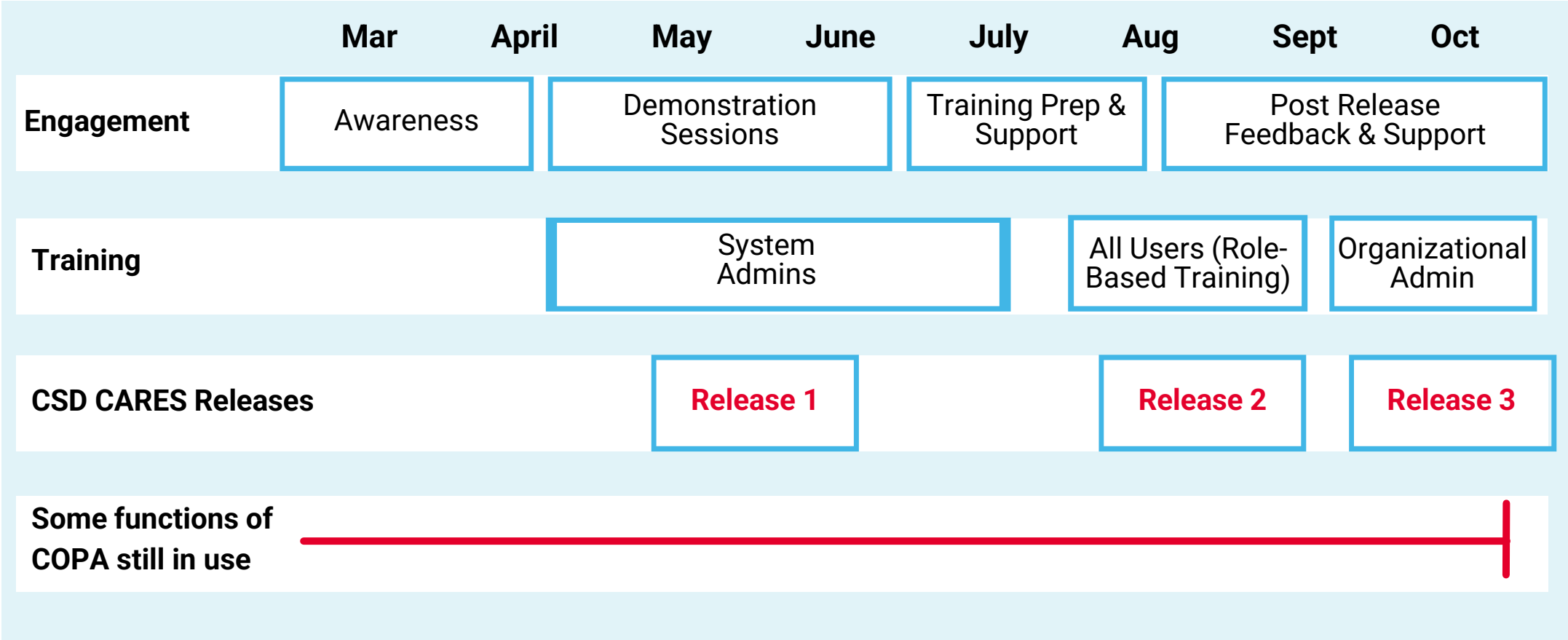
Release 3

Training: Fall 2022

Features related to:

- Inventory Management
- Slot Allocations
- Billing and Invoices
- Additional Enhancements

2022 PROJECT PLAN*



*Please note this plan is provided to give you an idea of the timeline, but dates and specific details are subject to change.



RELEASE 2 TRAININGS

	STAFF A	STAFF B	STAFF C
Basic Navigation	X	X	X
Enrollment Management - ERSEA	X		
Class Management - Attendance		X	
Core Case Management		X	X
Case Management: Education		X	
Case Management: Children with Disabilities			
Case Management: Mental Health Services			
Case Management: Health Services			
Case Management: Nutrition Services			
Case Management: Family & Com Engagement			X

PREPARING FOR TRAINING

- Trainings are role-based.
- Live trainings close 2 business days prior to each session.
- Trainings are interactive, which means when you attend a training, you will need to:
 - Use a PC with a keyboard and not a mobile device.
 - Be ready to log into the CSD Portal and the CSD CARES training platform to practice.
 - Have a microphone and speakers so that you can listen and speak during the session.

IMPORTANT! LOGGING INTO CSD CARES

You **MUST** have claimed your CSD Portal account, logged in, and made sure you have access to CSD CARES before your first **live** training session.

To claim your account:

- Look for announcements about when your login credentials are being/have been sent.
- Check your email for information on how to login. Check your spam folder as well.
- Follow the directions to claim your account to the CSD Portal right away so you can log in.
- Confirm you can see CSD CARES in your CSD Portal.

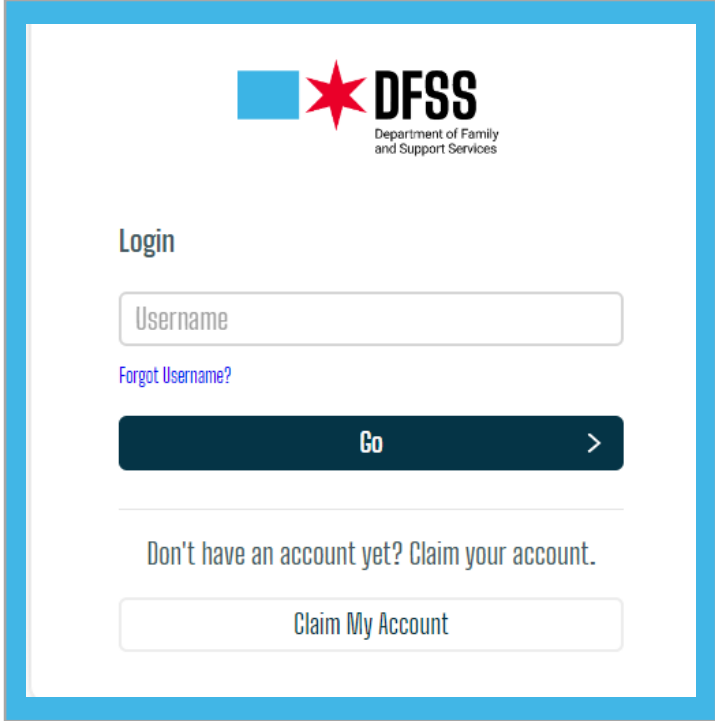
Getting support:

If you do not receive an email with your login credentials before your first live training, reach out to your supervisor and CSDSupport@cityofchicago.org at least 3 business days prior to your first training.

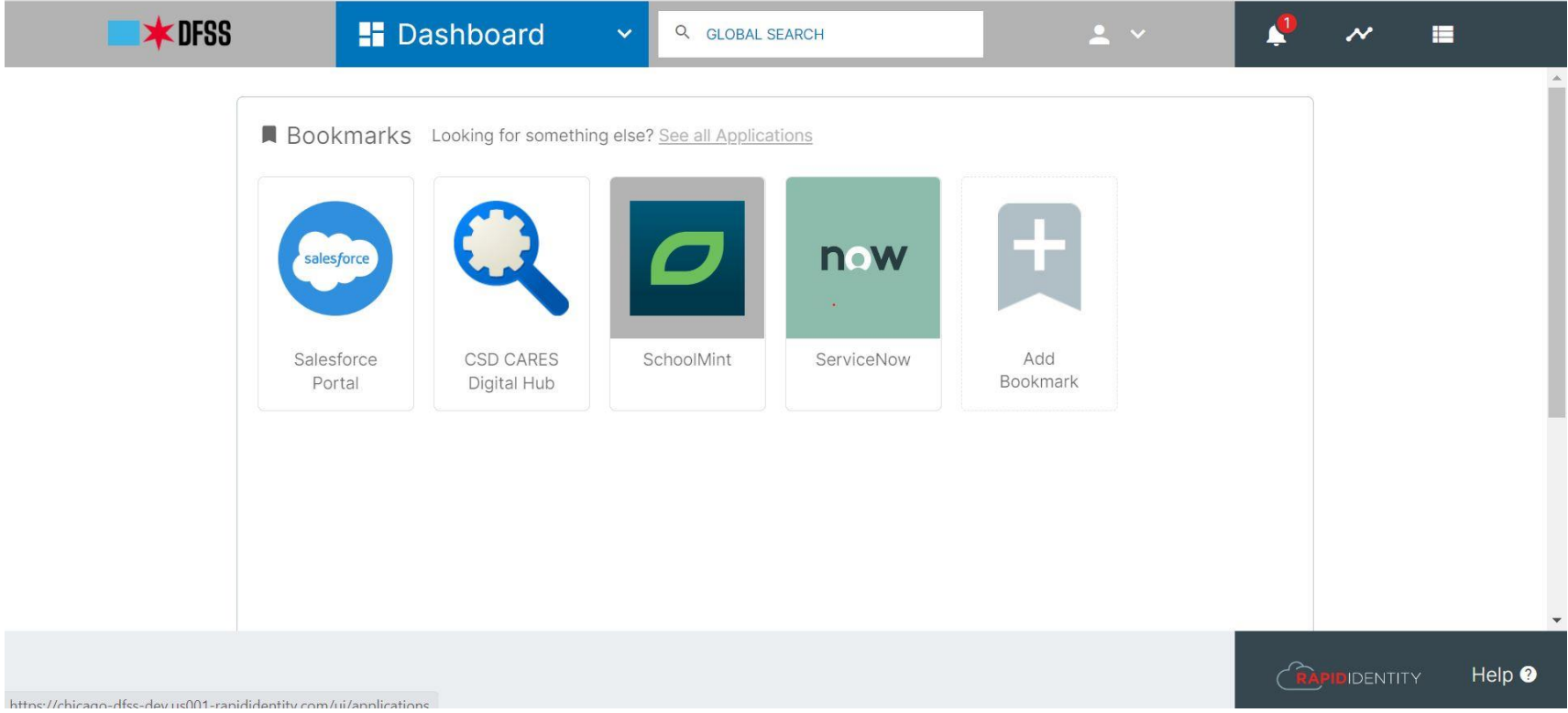


LOGGING INTO THE CSD PORTAL

https://chicago-dfss.org/



The screenshot shows the login page for the Department of Family and Support Services (DFSS). At the top left is the DFSS logo, which consists of a blue square and a red star, followed by the text "DFSS" and "Department of Family and Support Services" below it. Below the logo is a "Login" section with a text input field for "Username". To the left of the input field is a link that says "Forgot Username?". Below the input field is a dark blue button with the text "Go" and a right-pointing arrow. At the bottom of the login section is a link that says "Don't have an account yet? Claim your account." Below this link is a button that says "Claim My Account".



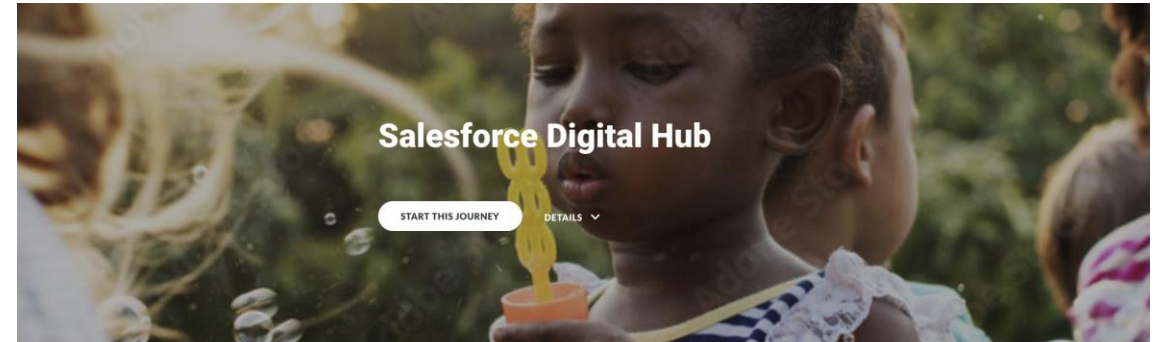
The screenshot shows the dashboard of the Chicago DFSS portal. At the top is a navigation bar with the DFSS logo on the left, a "Dashboard" menu item with a dropdown arrow, a "GLOBAL SEARCH" input field, and user profile icons on the right. Below the navigation bar is a "Bookmarks" section with the text "Looking for something else? See all Applications". The bookmarks section contains five tiles: "Salesforce Portal" with a Salesforce logo, "CSD CARES Digital Hub" with a gear and magnifying glass icon, "SchoolMint" with a green leaf icon, "ServiceNow" with a "now" logo, and "Add Bookmark" with a plus sign icon. At the bottom right of the dashboard is a "RAPIDIDENTITY" logo and a "Help" link with a question mark icon. The URL in the browser address bar is "https://chicago-dfss-dev.us001-rapididentity.com/ui/applications".

CSD CARES DEMONSTRATION



DIGITAL HUB FOR AGENCIES

- Resources for Logging In, SchoolMint and CSD CARES
- Agency staff can access a Digital Hub with **their** resources using a link and a password.
- The link and password can be shared with other agency staff, but please do not share with a wider audience.
- Link: <https://bit.ly/SalesforceDigitalHub>
Password: sTdzzMyGWkvF3FU2adrj



DFSS CHICAGO

This Digital Hub provides access to download Salesforce Implementation-related documents, including: **Frequently Asked Questions, messaging, training resources and communications**. You can also use this Hub to reach out to the implementation team with your questions and/or insights.

AGENCY STAFF

☰ FAQs for Agencies ○

☰ Messaging for Agencies ○

AGENCY LEADER

☰ FAQs for Agencies ○

☰ Messaging for Agencies ○

☰ Understanding the Change Journey ○

☰ Change Leader Video ○

☰ Leaders Guide ○



DIGITAL HUB RESOURCES



UNDERSTANDING CHANGE JOURNAL

A people managers' guide to understanding how individuals...



LEADING CHANGE

A people managers' guide for the transition from COPA to Salesforce.

FAQS FOR DELEGATE AGENCIES / SUB-RECIPIENTS

»»» What is this change?

To advance the Department of Family and Support Services (DFSS) Children Services Division's commitment to Chicago Early Learning (CEL) to maximize access to high quality early learning programs, the current early childhood enrollment and tracking system is being replaced with a state-of-the-art early learning solution from Salesforce.

»»» Why are we making this change?

To comply with federal requirements, we must regularly procure bids to make sure we benefit from new, innovative technologies to better serve the needs of Chicago's children and families. After reviewing options, we believe Salesforce is the best option for our current needs. The new system will:

- Improve data collection and management. Fewer attachments and offline documents.
- Facilitate automation for seamless information processing. Less emailing of information.
- Provide a better and more intuitive experience. User-centric.
- Access to the latest innovation from Salesforce. Future innovation pipeline.

»»» What is Salesforce?

Salesforce is a customer relationship management (CRM) platform that aims to give users a 360-view of the people in the system. Using this CRM, we will have a more holistic and clearer view of the children and families we serve by consolidating the many streams of data into one location and will be able to pull more comprehensive reports about the families we serve and how we serve them.

MESSAGING FOR DELEGATE AGENCIES

As you share details of this project with your team(s), please feel free to pull relevant information from these pages to support why we are making this change and how your team(s) will benefit.

»»» Tagline

The Department of Family and Support Services, Children Services Division is investing in the future needs of Chicago Early Learning programs. This will ensure the City can fully support sub-recipients / delegate agencies and maximize access to data quality ensuring consistent and accurate reporting and views of high quality early learning programs that serve Chicago's youngest residents.

»»» Elevator Pitch

The Department of Family and Support Services, Children Services Division is investing in a state-of-the-art early learning solution using Salesforce. The solution is easily configured for today and can be adapted to the future experiences of its differing users. With the collaboration of City departments and partnership with expert vendors, the operations, management, and reporting required to provide Chicago Early Learning programs will be made more efficient, flexible, and productive, allowing the City and sub-recipients / delegate agencies to better serve Chicago's youngest residents.

»»» Why is DFSS making this change?

The current technology was installed in 2004 to improve child enrollment tracking and produce federally required program reports. It has evolved to contain other business modules. To comply with federal requirements, we must regularly procure bids to make sure we benefit from new, innovative technologies to better serve the needs of Chicago's children and families.

Upon review of new technologies, the City of Chicago determined Salesforce is the best options for current needs and that this state-of-the-art technology will advance the City's commitment to providing high quality access and education to Chicago's children and families. This new solution will enable the City to support sub-recipients / delegate agencies, comply with grant reporting guidelines, and assess early learning program outcomes to facilitate data driven decision-making.

GETTING HELP & SUPPORT

1. Review the resources on your Digital Hub and come to ITK sessions, trainings, etc. so you are familiar with the project.
 - Link: <https://bit.ly/SalesforceDigitalHub>
 - Password: sTdzzMyGWkvF3FU2adrj
1. Check with your CSD contacts and your agency's ED and/or PD.
2. Reach out for questions and support:
 - Submit "Contact Us Form" through the Digital Hub
 - Email: CSDSupport@cityofchicago.org
 - Use the DFSS Help Desk Ticket System (for continued login issues)

TIME FOR Q&A



THANK YOU!



We hope you will join us for the upcoming ITK sessions on July 19, July 21 and July 27.

Please take the time to complete the survey following this session & to provide us with suggestions of topics YOU would like to hear about.